



COVER SHEET

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DESTINATION DECISION SETS: A LONGITUDINAL COMPARISON OF STATED PREFERENCES WITH ACTUAL BEHAVIOUR

Dr Steven Pike

Pike, S. (2006). Destination decision sets: A longitudinal comparison of stated destination preferences and actual travel. *Journal of Vacation Marketing*. 12(4): 319-328.

ABSTRACT

There have only been a small number of applications of consumer decision set theory to holiday destination choice, and these studies have tended to rely on a single cross sectional snapshot of research participants' stated preferences. Very little has been reported on the relationship between stated destination preferences and actual travel. To what degree then can marketers rely on consumers' stated attitudes if there is no supporting measure of actual behaviour? The paper presents a rare longitudinal examination of destination decision sets, and the first in the context of short break holidays by car in Queensland, Australia. Two questionnaires were administered, three months apart. The first identified destination preferences while the second examined actual travel and revisited destination preferences. The findings indicate a general consistency between attitude and behaviour in the short term. The results support the proposition that the positioning of a destination into a consumer's decision set represents a source of competitive advantage. A key implication for the destination of interest, which launched a new brand campaign during the period of the project, is that a long term investment in a clearly differentiated brand message will be required to improve awareness and intent to travel by consumers in the region's most important market. It is recommended that monitoring decision set composition represents an important and practical indicator of future performance for destination marketers.

Key words

Destination positioning, decision sets, longitudinal, short breaks, destination marketing organisations

INTRODUCTION

Travellers are now spoilt for choice of available holiday destinations¹. Competitiveness is now a major challenge facing most destinations², and has even been described as tourism's 'holy grail'³. Ultimately, destination competitiveness is decided by attitudes in the market place. In recognition of this, one of the most active research fields within the tourism literature has been investigations of destination image as an indicator of market attractiveness (see for example reviews of the destination image literature (^{4,5,6,7}). In comparison only a small number of studies have reported an interest in the concepts of destination positioning (see for example ^{8,9,10}) and destination decision sets (see for example ^{11,12}) as indicators of competitiveness, rather than merely destination attractiveness. Also, there has been relatively little research into the concepts of brand loyalty and brand switching in relation to destinations¹³. In examining the literature on short break holidays for example (see ^{13,14,15,16,17,18,19,20}), which are generally considered to be a low involvement decision, it is not known whether travellers have a set of favourite destinations to which they return regularly or whether they are open to the consideration of new destinations.

Positioning theory is concerned with the analysis of consumer attitudes, not in isolation as in the measurement of destination image, but relative to the competing set of brands. This then enables an understanding of points of differentiation on attributes/benefits deemed determinant to the target audience. Attractiveness may therefore only represent competitive parity if a number of contiguous destinations offer the same benefits. Decision set theory holds that individuals will realistically only consider a small subset of available brands in the purchase decision process^{21,22}. Consequently, it has been suggested the effective positioning of a destination into a consumer's decision set may represent a source of competitive advantage¹⁰. However, there has been little research reported in the literature that empirically tests this proposition. The paper benchmarks the competitiveness of an emerging

destination at the launch of a new brand campaign; through a longitudinal comparison of stated destination preferences and actual behaviour.

DESTINATION DECISION SETS

Howard²¹ and Howard and Sheth²² introduced the concept of consumer decision sets to propose the number of brands considered in any purchase decision was considerably lower than those the consumer is aware of and those that are available to the consumer. The decision set comprises only those brands the buyer will actually consider in the next purchase. Howard proposed the number of brands in an individual's decision set would remain constant at about three or four. Woodside and Sherrell¹¹ were the first to investigate destination decision sets. They were motivated by the proposition that the mental processes required to evaluate the features of 15 or more destinations would represent too great a task for most travellers. The concept of the decision set therefore has important implications for DMOs if it is from this set that final destination selection will be made (see ^{11,12,23,24}). It must be accepted that a hierarchy is developed within the decision set of destinations, if a final selection is to be made. The higher a brand's position in a consumers mind, the higher the intent to purchase ²⁵. Woodside and Wilson²⁶ cited research by Burke and Schoeffler²⁷, which supported this proposition. It has been shown that top of mind awareness (ToMA), measured by unaided recall, is related to purchase preference among competing brands^{25,26,28}. Consequently, for the destination that first comes to mind when a consumer is considering travel, ToMA must surely represent a source of advantage.

However, it is unclear the extent to which destinations listed in consumer decision sets are related to actual travel over time. In other words, to what degree can marketers rely on consumers' stated attitudes if there is no supporting measure of actual behaviour? The

longitudinal aspect of the project, which has been under-reported in the tourism literature, was partly motivated by Fishbein's²⁹ caution with regard to stated preferences:

After more than seventy-five years of attitude research, there is still little, if any, consistent evidence supporting the hypothesis that knowledge of an individual's attitude toward some object will allow one to predict the way he will behave with respect to the object.

Since an individual will likely hold different decision sets of destinations for different types of holidays, it is important that travel context be made explicit to participants. In this case travel context was narrowed to domestic short holidays by car in Australia. While there is no widely accepted definition in the literature, for this project a short break is defined as a non-business trip away from home of between 1-5 nights. This is one of the most competitive tourism markets for many destinations, given the plethora near home places available to travellers. It is proposed that in this environment where consumers use short breaks to recharge, and demand value for time, destinations are likely to be substitutable. Pride³⁰ cited Welsh Tourism Board findings that the primary motivation for a domestic short break "was the need to put something back into their lives, to relax, to recharge their batteries, to rebuild relationships and to revive their spirits".

The geographic market of interest is Brisbane, which is Queensland's state capital and most populous city. In the 2001 Australian census, Brisbane's 1.6 million residents represented almost 40% of the state total. There has been a lack of attention in the tourism literature towards short breaks in Australia. This is despite estimates that 76% of domestic travel in Australia is undertaken by car, 70% of travel takes place within the state of residence, and the mean length of stay for the domestic drive market in Queensland is four

nights³¹. Apart from an industry report prepared by Tourism Queensland³² no formal investigation of short breaks in Queensland has been published.

The destination of interest in the study is Queensland's Coral Coast. Queensland is Australia's 'sunshine state' and features a coastline of some 2000 kilometres ranging from sub-tropical to tropical. The Coral Coast region is classified by the state tourism organisation (STO), Tourism Queensland, as an 'emerging destination', and is one of 14 official tourism regions. This carries significant benefits for the Coral Coast as Tourism Queensland provides financial and human resources to aid the RTO marketing efforts. The region is situated 370 kilometres north of Brisbane, with a predominantly rural population. There is a small and slowly developing tourism infrastructure of small businesses and council amenities. The largest city is Bundaberg with a population of approximately 45,000. Including Bundaberg City Council, a total of 11 shire councils, representing beach and farm communities, have a direct interest in the region's RTO, Bundaberg Region Ltd.

In early 2003 the RTO launched a new brand campaign for use in the Brisbane market, which is the Coral Coast's largest source of visitors. The new brand development was stimulated by STO-organised focus groups indicating the destination suffered a poor image as a tourism destination in the Brisbane market. The theme of the new brand is *Take time to Discover Bundaberg, Coral Coast and Country*. Conducted independent of the RTO and STO, this research was initiated to provide a structured benchmark of market preferences, for which the DMO's future brand effectiveness tracking could be based. Key objectives for this paper were to identify:

1. the attractiveness of the Coral Coast in the Brisbane short break holiday market
2. the level of short break activity by Brisbane residents

3. preferred destinations, measured by unaided top of mind awareness (ToMA) and decision set composition
4. actual short break behaviour by participants during the period of the research
5. the consistency of the size and composition of destination decision sets over two periods of time

METHOD

The research took place during the period March-July 2003. This is the Autumn season in sub-tropical Brisbane, and features four public holidays (Easter, ANZAC Day, Labour Day and Queens Birthday) and a school/university holiday break. Brisbane's major consumer travel expo also takes place during this period. April is the second most popular month for holidays in Australia³¹. In the last week of March 2003 the first of two questionnaires was distributed to a systematic random sample of 3000 Brisbane households selected from the 2002/2003 telephone white pages. Envelopes were addressed to the name(s) as listed in the directory, and a cover letter requested the questionnaire be completed by the person in the household, aged 18 or over, who would next celebrate their birthday. The letter also advised a second and final questionnaire would be sent to participants three months later. An incentive prize of accommodation at a mystery short break destination was provided.

Since a key goal of the research was to tap unaided destination awareness, the longitudinal design enabled the first questionnaire to be free of any destination names that might bias participant thinking. Preferred destination status was operationalised by asking participants to name the destination that first comes to mind when considering their next short break. Fishbein and Ajzen³³ proposed any question exploring of the relationship between attitude and behaviour must include the following:

- The *behaviour*, which for the study is a holiday.
- The *target object* at which the behaviour is directed, which are domestic destinations.
- The *situation* in which the behaviour is to be performed, which is a self-drive short break.
- The *time* at which the behaviour is to be performed, which is within the next three months.

The response to this unaided awareness question is considered to be representative of top of mind awareness (ToMA). To measure decision set composition, the next question asked participants to list any other destinations they would *probably* consider for their next short break. Participants were asked a series of exploratory questions about the characteristics of short breaks, and to rate the importance of a battery of 36 destination attributes. A total of 523 completed questionnaires were received, which represented a useable response rate of 19%. This was considered satisfactory given the longitudinal nature of requested participation. The characteristics of participants, shown in Table 1, were compared to the 2001 Australian Census data. In general, the characteristics of the sample were similar to the wider Brisbane population, although as often is the case with market research there was a slightly higher representation from women and a lower representation of 18-24 year olds in the sample.

(TABLE 1 ABOUT HERE)

A second questionnaire was distributed during the first week of July to the 486 participants of stage one who agreed to participate in stage two. The questionnaire contained two questions relating to SARS and the War in Iraq, which occurred during the period of the research, three questions relating to actual short break behaviour during the April-June

quarter, preferred destinations for their next short break, and a section rating the performance of a competitive set of destinations across a subset of attributes deemed important in the first questionnaire. The latter is the focus of a future paper. Again, an incentive prize of accommodation at a mystery short break destination was offered. This resulted in 308 completed questionnaires, which represented a useable response rate of 63%.

RESULTS

Stage 1

Mean importance for taking at least one short break each year, on a seven point scale anchored at 'not important' (1) and 'very important' (7) was 6.3. Only 28 participants (5%) rated this item lower than the scale mid-point. A total of 320 participants (61%) indicated having taken a short break during the previous three months. The mean number of short breaks indicated each year was 3.2, with 84% of participants indicating two or more. These results indicate the importance of this travel activity and validate the participants as knowledgeable about the questionnaire topic. Almost half of the sample indicated a likelihood of taking a short break during the April-June quarter.

The mean maximum comfortable driving time to a short break destination was four hours, with approximately three quarters of participants indicating a maximum of four hours or less. This facilitates the development of a geographic boundary of available destinations, albeit taking into account the travelling time between Brisbane's northern and southern suburbs. Importantly, the Coral Coast is at the margin of this drive time.

A total of 86 ToMA destinations were elicited from participants. For reporting succinctness the list has been categorised by RTO boundary. As shown in Table 2 the most popular destination region was the Sunshine Coast, which was listed by almost half of the

sample (45%). This was over double the number who listed the second most popular region. Destinations in the Coral Coast region were listed by only 11 participants (2%).

(TABLE 2 ABOUT HERE)

Including the ToMA destination, the mean number of destinations listed in decision sets was 3.8, with two thirds of participants indicating a range of between two and four destinations. This is consistent with overseas studies focusing on other travel contexts (see for example ^{23,24}). Interestingly, analysis of variance and independent-samples *t* tests indicated no significant differences between decision set sizes by any demographic characteristics. Including ToMA destinations, over 120 places were elicited from participants. This clearly indicates the range of available destinations, and therefore competition, is considerable. Brisbane residents are literally spoilt by choice of near home destinations.

Stage 2

As shown in Table 3, 190 of the stage two participants almost two thirds (62%) indicated having taken a short break by car during the April-June quarter. Almost 25% participated in two or more short breaks during this period. Interestingly, this compares with the results of the first questionnaire where 61% of participants indicated having taken a short break during the previous three months. The pattern of visitation was similar to the stated ToMA, with 37% of trips taken to the Sunshine Coast, followed by Gold Coast (26%), Fraser Coast (9%), Northern NSW (8%), Brisbane (6%), Toowoomba/Darling Downs (5%), Coral Coast (2%), Capricorn Coast (1%), Discovery Coast (1%) and other destinations (5%).

(TABLE 3 ABOUT HERE)

Of the 190 participants who had taken a short break during this period, almost half (47%) visited the ToMA destination they had indicated in the first questionnaire. Almost 75% of participants who took a short break during the study visited at least one destination from their initial decision set. Significantly, 92% of participants indicated having previously visited their ToMA destination. Approximately one quarter of participants (26%) had visited their stage two ToMA destination during the previous three months. If, as indicated in the first questionnaire, participants are taking an average of three short breaks per year, this may be indicative of a desire to visit different destinations during different seasons. These findings clearly emphasise the importance of being positioned in the decision set of consumers. To do so represents an advantage over the majority of available destinations not listed.

(TABLE 3 ABOUT HERE)

Almost half of the stage two participants (48%) listed the same ToMA region in both questionnaires, indicating participants do have favourite destinations in their decision set. Table 4 shows the ToMA destination regions elicited from stage two participants. The ranking and ratio of preferences was consistent with the first questionnaire as previously shown in Table 2. For example, the Sunshine Coast was again the most popular selection, listed by 51% of participants in stage two, compared to 45% in stage one. Coral Coast destinations were listed by only 3% of participants, which was also consistent with the first questionnaire as well as actual visitation (2%).

(TABLE 4 ABOUT HERE)

Of interest to any marketer seeking to reinforce positively held perceptions in the marketplace would be identifying the characteristics of those participants who identified their destination as a ToMA selection as well as those who visited the destination. Unfortunately, in the Coral Coast case this information is of limited value, given only 11 participants identified the destination as ToMA, and only the same number visited during the three month period.

CONCLUSION

The focus of the paper is the proposition that a destination's membership of a consumer's decision set represents a source of competitive advantage¹⁰. This is based on a substantial literature relating to the concept of consumer decision sets, which has demonstrated through measures of stated intent that consumers only consider a range of four plus or minus two brands in purchase decisions. Inclusion or exclusion of a brand in the decision sets of target segments will have important implications. Therefore it is imperative that marketers have some process to monitor this. However, to date what has been unclear is the extent to which destinations listed in consumer decision sets show a relationship with actual travel over time. In other words, to what degree can marketers rely on consumers' stated attitudes if there is no supporting measure of actual behaviour? Schultz and Schultz³⁴ have been particularly critical of the general failure by market researchers to link attitudinal data with measures of actual behaviour, through longitudinal studies. The contribution of the is that it reports a rare longitudinal investigation into the relationship between stated tourism destination preferences and actual travel, in the context of domestic short break holidays by car. A sample of residents of Brisbane, the state capital of Queensland in Australia, indicated a strong propensity for short breaks. Participants indicated taking a mean of three short breaks per year. Destination preference was operationalised by unaided awareness questions to

identify the ToMA destination and the decision set for short breaks that might be considered during the following three months.

Even though participants elicited a range in excess of 100 near home destinations, the mean decision set size was limited to four destinations. Differentiating a beach in the Brisbane market is thus no small feat for marketers. Practically, the decision set size has serious implications for those destinations not listed. Given half of the sample indicated a likelihood of taking a short break within the next three months, these destinations are less likely to be considered in the selection process. It is this proposition that was the focus of the longitudinal stage, since it is argued that studies of consumer attitudes would be strengthened by including measures of actual behaviour. A second questionnaire was distributed three months after the first, in an attempt to compare travel during the period with the initial stated preferences. It was found that of those taking a short break during the three month period of the study, 75% visited at least one of the destinations listed in their decision set. The results also support the view that a hierarchy exists within the decision set, since almost half of the participants visited their ToMA destination during the period of the research.

The results go some way to support the proposition that the effective positioning of a destination into a consumer's decision set represents a source of competitive advantage. The findings indicate a general consistency between attitude and behaviour, with minimal evidence of destination switching in the short term. A further study is required to track changes in perceptions since 2003, in relation to the brand campaign activities undertaken. The findings of this study for example provide benchmarks by which the destinations will be able to measure brand campaign effectiveness. For the destination of interest, the findings indicate a low awareness and low intent to visit, by residents in their most important market who are spoilt for choice of nearby short break destinations. What is required by the Coral Coast is a focused and consistent brand positioning strategy if it is to cut through the noise of

the market place and gain a differentiated position, relative to the plethora of other beach areas. This will be no mean feat, as noted by Morgan, Pritchard and Piggott³⁵:

Yet despite this aggressive market place, the stock in trade of too much destination advertising remains blue seas, cloudless skies and endless golden beaches, with a less than memorable tagline. Such 'wallpaper' advertising, selling the user benefit of relaxation and a golden tan, has the effect of rendering all seaside destinations indistinguishable from one another.

As demonstrated by Gartner and Hunt³⁶, destination image change occurs only slowly. This is particularly relevant for a low awareness beach destination in a state such as Queensland with thousands of kilometres of coastline. Brisbane residents are spoilt by choice of nearby coastal destinations, and a beach is a beach is a beach...

Clearly, being listed in a consumer decision set of only four destinations out of a 120 destinations is an important RTO marketing performance measure. In the case of the Coral Coast, the lack of presence in decision sets at the time of a new destination brand launch represents a competitive disadvantage. The destination rated poorly in decision set composition (attitude) and then in actual travel (behaviour). Research interested in destination attractiveness and competitiveness must therefore include a measure relative to the competitive set of destinations and a measure of conation. After all, for any commercial organisation the latter would surely represent a source of goodwill or brand equity. At the time of writing, key results had been presented to 11 of the 14 Queensland RTOs. The data represented the first market research on short breaks for each of these organisations, none of which had considered the concept of monitoring decision sets.

As noted by Oppermann³⁷, longitudinal studies have rarely been reported in the tourism literature. A contribution of this longitudinal study is the results indicate, in the context of short breaks by car, consumers have favourite short break destinations, to which they make repeat visitation. This may reflect the low involvement decision making where familiarity with a destination minimises perceived risk. Certainly in the short term at least, there was almost no change in the overall destination preferences. It could be argued that three months is a limited period in which to conduct a longitudinal investigation. However, it is suggested that a longer period runs the risk of imposing potential memory problems on participants and result in bias effects such as telescoping. Also, the three month period was effective in providing effective benchmarking due to the consistency in decision set responses in the two stages. Importantly, the findings support the previous literature relating to the efficacy of decision set theory as an indicator of future performance.

In the time since this study an important intervening variable in measuring short break destination attractiveness has emerged in Australia. The introduction of low cost airlines Jet Star and Virgin Blue have opened up new opportunities for destinations further a field to compete for the Brisbane short break market. These destinations include Great Barrier Reef islands, Townsville and Cairns within Queensland, as well as interstate options such as Sydney and Melbourne. Additionally, New Zealand has emerged as an affordable short break option through low coast international carrier Freedom Airlines. Further research into the impact of these airlines on the Brisbane short break market, such as that recently conducted on the trans Tasman route by Ryan and Birks³⁸ will have implications for destinations far wider than those within a maximum comfortable drive of four hours of Brisbane.

ACKNOWLEDGEMENT

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Table 1 - Characteristics of Participants

		n	Valid %
Gender	Male	199	38.0%
	Female	324	62.0%
	Total	521	
	Missing	2	
Age	18-24	16	3.1%
	25-44	212	40.6%
	45-64	244	46.7%
	65+	50	9.6%
	Total	522	
	Missing	1	
Annual household income	Less than \$78,000	372	73.2%
	\$78,000 or more	136	26.8%
	Total	508	
	Missing	15	
Marital status	Single	57	10.9%
	Married/permanent partner	395	75.7%
	Separated, divorced, widowed	70	13.4%
	Total	522	
	Missing	1	
Number of dependent children	0	283	54.1%
	1-2	182	34.8%
	3+	56	10.7%
	Total	521	

	Missing	2	
Highest level of education	High school	211	40.6%
	TAFE	123	23.7%
	University graduate	164	31.5%
	Other	22	4.2%
	Total	520	
	Missing	3	

Table 2: ToMA Destinations by RTO Boundary

Region	Frequency	Valid Percent
Sunshine Coast	231	45.1%
Gold Coast	96	18.8%
Northern New South Wales	57	11.1%
Fraser Coast	33	6.4%
Darling Downs	20	3.9%
Brisbane/Moreton Bay islands	17	3.3%
Coral Coast	11	2.1%
Discovery Coast	7	1.4%
Capricorn Coast	7	1.4%
Other New South Wales	6	1.2%
Other	27	5.3%
Missing	11	
Total	523	

Table 3: Number of short breaks during April-June

Number of trips	n	Per cent
0	118	38%
1	117	38%
2	48	16%
3	19	6%
4	3	1%
5	3	1%
Total	308	

Table 4 – Comparison of ToMA destinations elicited in Stages One and Two with destinations visited

Destination Region	ToMA Stage One	Visitation during April-June	ToMA Stage Two
Sunshine Coast	45%	37%	51%
Gold Coast	19%	26%	18%
Northern NSW	11%	8%	11%
Fraser Coast	6%	9%	7%
Coral Coast	2%	2%	3%
Darling Downs	4%	5%	2%
Capricorn Coast	1%	1%	2%
Brisbane/Moreton Bay islands	3%	6%	1%
Discovery Coast	1%	1%	1%
Other	5%	5%	3%

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Destination positioning, decision sets, longitudinal, short breaks, destination marketing organisations

INTRODUCTION

Travellers are now spoilt for choice of available holiday destinations¹. Competitiveness is now a major challenge facing most destinations², and has even been described as tourism's 'holy grail'³. Ultimately, destination competitiveness is decided by attitudes in the market place. In recognition of this, one of the most active research fields within the tourism literature has been investigations of destination image as an indicator of market attractiveness (see for example reviews of the destination image literature (4,5,6,7)). In comparison only a small number of studies have reported an interest in the concepts of destination positioning (see for example 8,9,10) and destination decision sets (see for example 11,12) as indicators of competitiveness, rather than merely destination attractiveness. Also, there has been relatively little research into the concepts of brand loyalty and brand switching in relation to destinations¹³. In examining the literature on short break holidays for example (see 13,14,15,16,17,18,19,20), which are generally considered to be a low involvement decision, it is not known whether travellers have a set of favourite destinations to which they return regularly or whether they are open to the consideration of new destinations.

Positioning theory is concerned with the analysis of consumer attitudes, not in isolation as in the measurement of destination image, but relative to the competing set of brands. This then enables an understanding of points of differentiation on attributes/benefits deemed determinant to the target audience. Attractiveness may therefore only represent competitive parity if a number of contiguous destinations offer the same benefits. Decision set theory holds that individuals will realistically only consider a small subset of available brands in the purchase decision process^{21,22}. Consequently, it has been suggested the effective positioning of a destination into a consumer's decision set may represent a source of competitive advantage¹⁰. However, there has been little research reported in the literature that empirically tests this proposition. The paper benchmarks the competitiveness of an emerging

destination at the launch of a new brand campaign; through a longitudinal comparison of stated destination preferences and actual behaviour.

DESTINATION DECISION SETS

Howard²¹ and Howard and Sheth²² introduced the concept of consumer decision sets to propose the number of brands considered in any purchase decision was considerably lower than those the consumer is aware of and those that are available to the consumer. The decision set comprises only those brands the buyer will actually consider in the next purchase. Howard proposed the number of brands in an individual's decision set would remain constant at about three or four. Woodside and Sherrell¹¹ were the first to investigate destination decision sets. They were motivated by the proposition that the mental processes required to evaluate the features of 15 or more destinations would represent too great a task for most travellers. The concept of the decision set therefore has important implications for DMOs if it is from this set that final destination selection will be made (see ^{11,12,23,24}). It must be accepted that a hierarchy is developed within the decision set of destinations, if a final selection is to be made. The higher a brand's position in a consumers mind, the higher the intent to purchase ²⁵. Woodside and Wilson²⁶ cited research by Burke and Schoeffler²⁷, which supported this proposition. It has been shown that top of mind awareness (ToMA), measured by unaided recall, is related to purchase preference among competing brands^{25,26,28}. Consequently, for the destination that first comes to mind when a consumer is considering travel, ToMA must surely represent a source of advantage.

However, it is unclear the extent to which destinations listed in consumer decision sets are related to actual travel over time. In other words, to what degree can marketers rely on consumers' stated attitudes if there is no supporting measure of actual behaviour? The

longitudinal aspect of the project, which has been under-reported in the tourism literature, was partly motivated by Fishbein's²⁹ caution with regard to stated preferences:

After more than seventy-five years of attitude research, there is still little, if any, consistent evidence supporting the hypothesis that knowledge of an individual's attitude toward some object will allow one to predict the way he will behave with respect to the object.

Since an individual will likely hold different decision sets of destinations for different types of holidays, it is important that travel context be made explicit to participants. In this case travel context was narrowed to domestic short holidays by car in Australia. While there is no widely accepted definition in the literature, for this project a short break is defined as a non-business trip away from home of between 1-5 nights. This is one of the most competitive tourism markets for many destinations, given the plethora near home places available to travellers. It is proposed that in this environment where consumers use short breaks to recharge, and demand value for time, destinations are likely to be substitutable. Pride³⁰ cited Welsh Tourism Board findings that the primary motivation for a domestic short break "was the need to put something back into their lives, to relax, to recharge their batteries, to rebuild relationships and to revive their spirits".

The geographic market of interest is Brisbane, which is Queensland's state capital and most populous city. In the 2001 Australian census, Brisbane's 1.6 million residents represented almost 40% of the state total. There has been a lack of attention in the tourism literature towards short breaks in Australia. This is despite estimates that 76% of domestic travel in Australia is undertaken by car, 70% of travel takes place within the state of residence, and the mean length of stay for the domestic drive market in Queensland is four

nights³¹. Apart from an industry report prepared by Tourism Queensland³² no formal investigation of short breaks in Queensland has been published.

The destination of interest in the study is Queensland's Coral Coast. Queensland is Australia's 'sunshine state' and features a coastline of some 2000 kilometres ranging from sub-tropical to tropical. The Coral Coast region is classified by the state tourism organisation (STO), Tourism Queensland, as an 'emerging destination', and is one of 14 official tourism regions. This carries significant benefits for the Coral Coast as Tourism Queensland provides financial and human resources to aid the RTO marketing efforts. The region is situated 370 kilometres north of Brisbane, with a predominantly rural population. There is a small and slowly developing tourism infrastructure of small businesses and council amenities. The largest city is Bundaberg with a population of approximately 45,000. Including Bundaberg City Council, a total of 11 shire councils, representing beach and farm communities, have a direct interest in the region's RTO, Bundaberg Region Ltd.

In early 2003 the RTO launched a new brand campaign for use in the Brisbane market, which is the Coral Coast's largest source of visitors. The new brand development was stimulated by STO-organised focus groups indicating the destination suffered a poor image as a tourism destination in the Brisbane market. The theme of the new brand is *Take time to Discover Bundaberg, Coral Coast and Country*. Conducted independent of the RTO and STO, this research was initiated to provide a structured benchmark of market preferences, for which the DMO's future brand effectiveness tracking could be based. Key objectives for this paper were to identify:

1. the attractiveness of the Coral Coast in the Brisbane short break holiday market
2. the level of short break activity by Brisbane residents

3. preferred destinations, measured by unaided top of mind awareness (ToMA) and decision set composition
4. actual short break behaviour by participants during the period of the research
5. the consistency of the size and composition of destination decision sets over two periods of time

METHOD

The research took place during the period March-July 2003. This is the Autumn season in sub-tropical Brisbane, and features four public holidays (Easter, ANZAC Day, Labour Day and Queens Birthday) and a school/university holiday break. Brisbane's major consumer travel expo also takes place during this period. April is the second most popular month for holidays in Australia³¹. In the last week of March 2003 the first of two questionnaires was distributed to a systematic random sample of 3000 Brisbane households selected from the 2002/2003 telephone white pages. Envelopes were addressed to the name(s) as listed in the directory, and a cover letter requested the questionnaire be completed by the person in the household, aged 18 or over, who would next celebrate their birthday. The letter also advised a second and final questionnaire would be sent to participants three months later. An incentive prize of accommodation at a mystery short break destination was provided.

Since a key goal of the research was to tap unaided destination awareness, the longitudinal design enabled the first questionnaire to be free of any destination names that might bias participant thinking. Preferred destination status was operationalised by asking participants to name the destination that first comes to mind when considering their next short break. Fishbein and Ajzen³³ proposed any question exploring of the relationship between attitude and behaviour must include the following:

- The *behaviour*, which for the study is a holiday.
- The *target object* at which the behaviour is directed, which are domestic destinations.
- The *situation* in which the behaviour is to be performed, which is a self-drive short break.
- The *time* at which the behaviour is to be performed, which is within the next three months.

The response to this unaided awareness question is considered to be representative of top of mind awareness (ToMA). To measure decision set composition, the next question asked participants to list any other destinations they would *probably* consider for their next short break. Participants were asked a series of exploratory questions about the characteristics of short breaks, and to rate the importance of a battery of 36 destination attributes. A total of 523 completed questionnaires were received, which represented a useable response rate of 19%. This was considered satisfactory given the longitudinal nature of requested participation. The characteristics of participants, shown in Table 1, were compared to the 2001 Australian Census data. In general, the characteristics of the sample were similar to the wider Brisbane population, although as often is the case with market research there was a slightly higher representation from women and a lower representation of 18-24 year olds in the sample.

(TABLE 1 ABOUT HERE)

A second questionnaire was distributed during the first week of July to the 486 participants of stage one who agreed to participate in stage two. The questionnaire contained two questions relating to SARS and the War in Iraq, which occurred during the period of the research, three questions relating to actual short break behaviour during the April-June

quarter, preferred destinations for their next short break, and a section rating the performance of a competitive set of destinations across a subset of attributes deemed important in the first questionnaire. The latter is the focus of a future paper. Again, an incentive prize of accommodation at a mystery short break destination was offered. This resulted in 308 completed questionnaires, which represented a useable response rate of 63%.

RESULTS

Stage 1

Mean importance for taking at least one short break each year, on a seven point scale anchored at 'not important' (1) and 'very important' (7) was 6.3. Only 28 participants (5%) rated this item lower than the scale mid-point. A total of 320 participants (61%) indicated having taken a short break during the previous three months. The mean number of short breaks indicated each year was 3.2, with 84% of participants indicating two or more. These results indicate the importance of this travel activity and validate the participants as knowledgeable about the questionnaire topic. Almost half of the sample indicated a likelihood of taking a short break during the April-June quarter.

The mean maximum comfortable driving time to a short break destination was four hours, with approximately three quarters of participants indicating a maximum of four hours or less. This facilitates the development of a geographic boundary of available destinations, albeit taking into account the travelling time between Brisbane's northern and southern suburbs. Importantly, the Coral Coast is at the margin of this drive time.

A total of 86 ToMA destinations were elicited from participants. For reporting succinctness the list has been categorised by RTO boundary. As shown in Table 2 the most popular destination region was the Sunshine Coast, which was listed by almost half of the

sample (45%). This was over double the number who listed the second most popular region. Destinations in the Coral Coast region were listed by only 11 participants (2%).

(TABLE 2 ABOUT HERE)

Including the ToMA destination, the mean number of destinations listed in decision sets was 3.8, with two thirds of participants indicating a range of between two and four destinations. This is consistent with overseas studies focusing on other travel contexts (see for example ^{23,24}). Interestingly, analysis of variance and independent-samples *t* tests indicated no significant differences between decision set sizes by any demographic characteristics. Including ToMA destinations, over 120 places were elicited from participants. This clearly indicates the range of available destinations, and therefore competition, is considerable. Brisbane residents are literally spoilt by choice of near home destinations.

Stage 2

As shown in Table 3, 190 of the stage two participants almost two thirds (62%) indicated having taken a short break by car during the April-June quarter. Almost 25% participated in two or more short breaks during this period. Interestingly, this compares with the results of the first questionnaire where 61% of participants indicated having taken a short break during the previous three months. The pattern of visitation was similar to the stated ToMA, with 37% of trips taken to the Sunshine Coast, followed by Gold Coast (26%), Fraser Coast (9%), Northern NSW (8%), Brisbane (6%), Toowoomba/Darling Downs (5%), Coral Coast (2%), Capricorn Coast (1%), Discovery Coast (1%) and other destinations (5%).

(TABLE 3 ABOUT HERE)

Of the 190 participants who had taken a short break during this period, almost half (47%) visited the ToMA destination they had indicated in the first questionnaire. Almost 75% of participants who took a short break during the study visited at least one destination from their initial decision set. Significantly, 92% of participants indicated having previously visited their ToMA destination. Approximately one quarter of participants (26%) had visited their stage two ToMA destination during the previous three months. If, as indicated in the first questionnaire, participants are taking an average of three short breaks per year, this may be indicative of a desire to visit different destinations during different seasons. These findings clearly emphasise the importance of being positioned in the decision set of consumers. To do so represents an advantage over the majority of available destinations not listed.

(TABLE 3 ABOUT HERE)

Almost half of the stage two participants (48%) listed the same ToMA region in both questionnaires, indicating participants do have favourite destinations in their decision set. Table 4 shows the ToMA destination regions elicited from stage two participants. The ranking and ratio of preferences was consistent with the first questionnaire as previously shown in Table 2. For example, the Sunshine Coast was again the most popular selection, listed by 51% of participants in stage two, compared to 45% in stage one. Coral Coast destinations were listed by only 3% of participants, which was also consistent with the first questionnaire as well as actual visitation (2%).

(TABLE 4 ABOUT HERE)

Of interest to any marketer seeking to reinforce positively held perceptions in the marketplace would be identifying the characteristics of those participants who identified their destination as a ToMA selection as well as those who visited the destination. Unfortunately, in the Coral Coast case this information is of limited value, given only 11 participants identified the destination as ToMA, and only the same number visited during the three month period.

CONCLUSION

The focus of the paper is the proposition that a destination's membership of a consumer's decision set represents a source of competitive advantage¹⁰. This is based on a substantial literature relating to the concept of consumer decision sets, which has demonstrated through measures of stated intent that consumers only consider a range of four plus or minus two brands in purchase decisions. Inclusion or exclusion of a brand in the decision sets of target segments will have important implications. Therefore it is imperative that marketers have some process to monitor this. However, to date what has been unclear is the extent to which destinations listed in consumer decision sets show a relationship with actual travel over time. In other words, to what degree can marketers rely on consumers' stated attitudes if there is no supporting measure of actual behaviour? Schultz and Schultz³⁴ have been particularly critical of the general failure by market researchers to link attitudinal data with measures of actual behaviour, through longitudinal studies. The contribution of the is that it reports a rare longitudinal investigation into the relationship between stated tourism destination preferences and actual travel, in the context of domestic short break holidays by car. A sample of residents of Brisbane, the state capital of Queensland in Australia, indicated a strong propensity for short breaks. Participants indicated taking a mean of three short breaks per year. Destination preference was operationalised by unaided awareness questions to

identify the ToMA destination and the decision set for short breaks that might be considered during the following three months.

Even though participants elicited a range in excess of 100 near home destinations, the mean decision set size was limited to four destinations. Differentiating a beach in the Brisbane market is thus no small feat for marketers. Practically, the decision set size has serious implications for those destinations not listed. Given half of the sample indicated a likelihood of taking a short break within the next three months, these destinations are less likely to be considered in the selection process. It is this proposition that was the focus of the longitudinal stage, since it is argued that studies of consumer attitudes would be strengthened by including measures of actual behaviour. A second questionnaire was distributed three months after the first, in an attempt to compare travel during the period with the initial stated preferences. It was found that of those taking a short break during the three month period of the study, 75% visited at least one of the destinations listed in their decision set. The results also support the view that a hierarchy exists within the decision set, since almost half of the participants visited their ToMA destination during the period of the research.

The results go some way to support the proposition that the effective positioning of a destination into a consumer's decision set represents a source of competitive advantage. The findings indicate a general consistency between attitude and behaviour, with minimal evidence of destination switching in the short term. A further study is required to track changes in perceptions since 2003, in relation to the brand campaign activities undertaken. The findings of this study for example provide benchmarks by which the destinations will be able to measure brand campaign effectiveness. For the destination of interest, the findings indicate a low awareness and low intent to visit, by residents in their most important market who are spoilt for choice of nearby short break destinations. What is required by the Coral Coast is a focused and consistent brand positioning strategy if it is to cut through the noise of

the market place and gain a differentiated position, relative to the plethora of other beach areas. This will be no mean feat, as noted by Morgan, Pritchard and Piggott³⁵:

Yet despite this aggressive market place, the stock in trade of too much destination advertising remains blue seas, cloudless skies and endless golden beaches, with a less than memorable tagline. Such 'wallpaper' advertising, selling the user benefit of relaxation and a golden tan, has the effect of rendering all seaside destinations indistinguishable from one another.

As demonstrated by Gartner and Hunt³⁶, destination image change occurs only slowly. This is particularly relevant for a low awareness beach destination in a state such as Queensland with thousands of kilometres of coastline. Brisbane residents are spoilt by choice of nearby coastal destinations, and a beach is a beach is a beach...

Clearly, being listed in a consumer decision set of only four destinations out of a 120 destinations is an important RTO marketing performance measure. In the case of the Coral Coast, the lack of presence in decision sets at the time of a new destination brand launch represents a competitive disadvantage. The destination rated poorly in decision set composition (attitude) and then in actual travel (behaviour). Research interested in destination attractiveness and competitiveness must therefore include a measure relative to the competitive set of destinations and a measure of conation. After all, for any commercial organisation the latter would surely represent a source of goodwill or brand equity. At the time of writing, key results had been presented to 11 of the 14 Queensland RTOs. The data represented the first market research on short breaks for each of these organisations, none of which had considered the concept of monitoring decision sets.

As noted by Oppermann³⁷, longitudinal studies have rarely been reported in the tourism literature. A contribution of this longitudinal study is the results indicate, in the context of short breaks by car, consumers have favourite short break destinations, to which they make repeat visitation. This may reflect the low involvement decision making where familiarity with a destination minimises perceived risk. Certainly in the short term at least, there was almost no change in the overall destination preferences. It could be argued that three months is a limited period in which to conduct a longitudinal investigation. However, it is suggested that a longer period runs the risk of imposing potential memory problems on participants and result in bias effects such as telescoping. Also, the three month period was effective in providing effective benchmarking due to the consistency in decision set responses in the two stages. Importantly, the findings support the previous literature relating to the efficacy of decision set theory as an indicator of future performance.

In the time since this study an important intervening variable in measuring short break destination attractiveness has emerged in Australia. The introduction of low cost airlines Jet Star and Virgin Blue have opened up new opportunities for destinations further a field to compete for the Brisbane short break market. These destinations include Great Barrier Reef islands, Townsville and Cairns within Queensland, as well as interstate options such as Sydney and Melbourne. Additionally, New Zealand has emerged as an affordable short break option through low coast international carrier Freedom Airlines. Further research into the impact of these airlines on the Brisbane short break market, such as that recently conducted on the trans Tasman route by Ryan and Birks³⁸ will have implications for destinations far wider than those within a maximum comfortable drive of four hours of Brisbane.

ACKNOWLEDGEMENT

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Table 1 - Characteristics of Participants

		n	Valid %
Gender	Male	199	38.0%
	Female	324	62.0%
	Total	521	
	Missing	2	
Age	18-24	16	3.1%
	25-44	212	40.6%
	45-64	244	46.7%
	65+	50	9.6%
	Total	522	
	Missing	1	
Annual household income	Less than \$78,000	372	73.2%
	\$78,000 or more	136	26.8%
	Total	508	
	Missing	15	
Marital status	Single	57	10.9%
	Married/permanent partner	395	75.7%
	Separated, divorced, widowed	70	13.4%
	Total	522	
	Missing	1	
Number of dependent children	0	283	54.1%
	1-2	182	34.8%
	3+	56	10.7%
	Total	521	

	Missing	2	
Highest level of education	High school	211	40.6%
	TAFE	123	23.7%
	University graduate	164	31.5%
	Other	22	4.2%
	Total	520	
	Missing	3	

Table 2: ToMA Destinations by RTO Boundary

Region	Frequency	Valid Percent
Sunshine Coast	231	45.1%
Gold Coast	96	18.8%
Northern New South Wales	57	11.1%
Fraser Coast	33	6.4%
Darling Downs	20	3.9%
Brisbane/Moreton Bay islands	17	3.3%
Coral Coast	11	2.1%
Discovery Coast	7	1.4%
Capricorn Coast	7	1.4%
Other New South Wales	6	1.2%
Other	27	5.3%
Missing	11	
Total	523	

Table 3: Number of short breaks during April-June

Number of trips	n	Per cent
0	118	38%
1	117	38%
2	48	16%
3	19	6%
4	3	1%
5	3	1%
Total	308	

Table 4 – Comparison of ToMA destinations elicited in Stages One and Two with destinations visited

Destination Region	ToMA Stage One	Visitation during April-June	ToMA Stage Two
Sunshine Coast	45%	37%	51%
Gold Coast	19%	26%	18%
Northern NSW	11%	8%	11%
Fraser Coast	6%	9%	7%
Coral Coast	2%	2%	3%
Darling Downs	4%	5%	2%
Capricorn Coast	1%	1%	2%
Brisbane/Moreton Bay islands	3%	6%	1%
Discovery Coast	1%	1%	1%
Other	5%	5%	3%